CHAUTAUQUA COUNTY NY

SS TO NSS ANALYSIS

AIM DATA / PRE VS POST ANALYSIS. INDIAN RESERVATION BUSINESS EXCLUDED.
THREE MONTHS PRIOR TO NSS BAN (APR THROUGH JUNE), VS THREE MONTHS AFTER NSS BAN (SEPT THROUGH NOVEMBER.)
JULY AND AUGUST LEFT OUT DUE TO RETAIL DISRUPTION.

	PRE PERIOD APR-JUNE CARTONS SHIPPED	POST PERIOD SEPT.-NOV CARTONS SHIPPED	DIFFERENCE PRE VS POST CARTONS SHIPPED	% CHANGE
ALL OUTLETS:	175,709	158,336	(17,373)	-9.89%
SUPERMARKET:	29295	21541	(7,754)	-26.47%
CONVENIENCE/GAS:	81253	80765	(488)	-0.60%
OTHER OUTLETS:	65,161	56,030	(9,131)	-14.01%

FINDINGS:

TOTAL INDUSTRY CARTON VOLUME DECLINED FOR NON-INDIAN RETAIL AS A RESULT OF THE AUG. 96 CHAUTAUQUA COUNTY SS BAN. WHILE PART OF THIS VOLUME LOSS CAN BE ATTRIBUTED TO ADJUSTED INVENTORY LEVELS AS SPACE ALLOTTED TO THE CATEGORY WAS REDUCED, THE MAJORITY OF THE LOST BUSINESS MOST LIKELY SHIFTED TO INDIAN OUTLETS DUE TO SMOKER CONVENIENCE VS. NSS OUTLETS.

SUPERMARKETS AND DISCOUNT STORE LOCATIONS SEEMED TO BEAR THE BRUNT OF THE LEGISLATION POSTING MUCH LARGER VOLUME LOSSES VS. CONVENIENCE/GAS LOCATIONS. THIS CAN MOST LIKELY BE ATTRIBUTED TO THE CONVENIENCE STORES ABILITY TO CONTINUE TO GIVE THE CATEGORY HIGH VISIBILITY VIA BACK BAR EXPOSURE AND SECURITY SHIELDS PLACED ON COUNTER PACK RACKS. SUPERMARKETS AND DISCOUNT STORES GENERALLY PLACED THE CATEGORY IN LOW VISIBILITY NSS LOCATIONS OR LOCKED THE FIXTURES WHICH WAS INCONVENIENT TO SMOKERS.

HAD INDIAN RESERVATIONS NOT BEEN AN OPTION FOR SMOKERS, THE CONVENIENCE GAS TRADE SEGMENT LOCATIONS THAT CONTINEUED TO GIVE THE CATEGORY HIGH EXPOSURE WOULD PROBABLY HAVE POSTED A VOLUME INCREASE AS A RESULT OF THE SS BAN.

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Source: https://www.industrydocuments.ucsf.edu/docs/hlwn0000